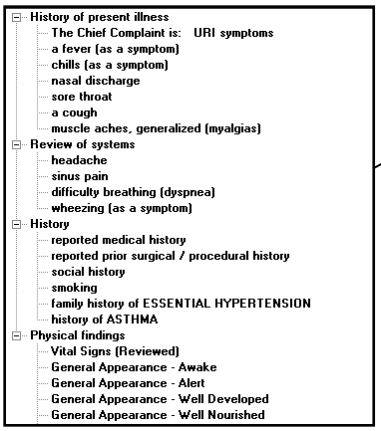
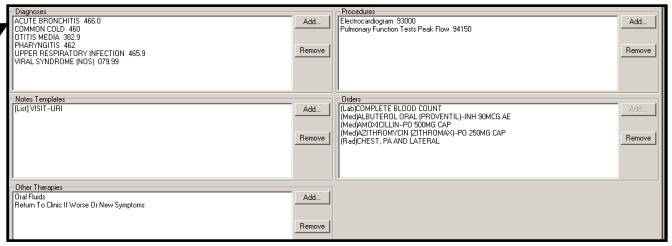
Types of Templates

S/O Visit Templates are built to document the subjective and objective portion of an encounter.





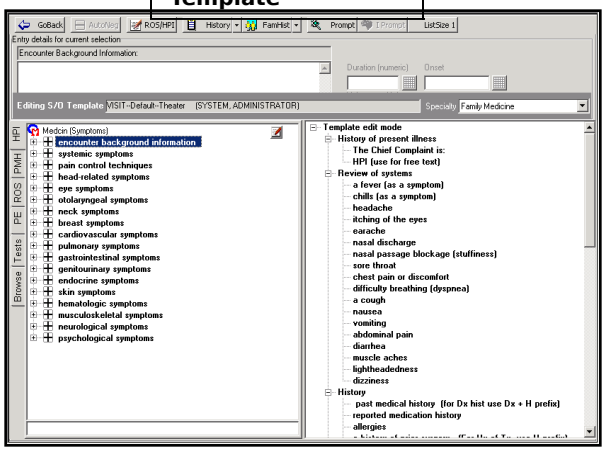
Encounter Templates are built to document all aspects of the patient visit. These combine the S/O Visit template, diagnoses, procedures, order sets, and other therapies.

Editing Existing S/O Visit Templates

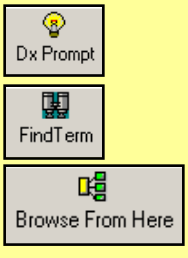
New CHCS II users should select existing S/O Visit Templates and edit them to reflect your documentation style and common visit types. S/O Visit Templates are available in the CHCS II application for you to edit.

1. Create an appt for a test patient in the test clinic and navigate to the S/O module.
2. Click **Template Mgt** in the Action Bar to open the S/O Template Management screen.
3. Search for the S/O template. Highlight the existing S/O Visit Template you wish to edit and click **Edit** in the Action Bar to enter *Template Edit Mode.*
4. To add terms to the template, use MEDCIN search tools such as **Dx Prompt, Find Term, and Browse From Here** to locate the term you need. When the term is found, click the large plus to add the term to the template.
5. To remove terms from the template, highlight a term from the template and deselect the red plus that appears with the term in MEDCIN Edit View.
6. When the editing is completed, click **Save As** in the Action Bar, name the template, and click **Save.** If you are editing one of your personal templates, click **Save** from the Action Bar if you want to keep the same template name.
7. Click **Cancel** in the Action Bar to exit *Template Edit Mode*. From the S/O Template Management screen, click **Refresh** in the Action Bar to view your new template.

Existing S/O Template



Template Edit Mode



Search Tools in the Action Bar

Dx Prompt: Returns a list of terms related to the entered diagnosis.

Find Term: Returns a list of terms related to the entered term.

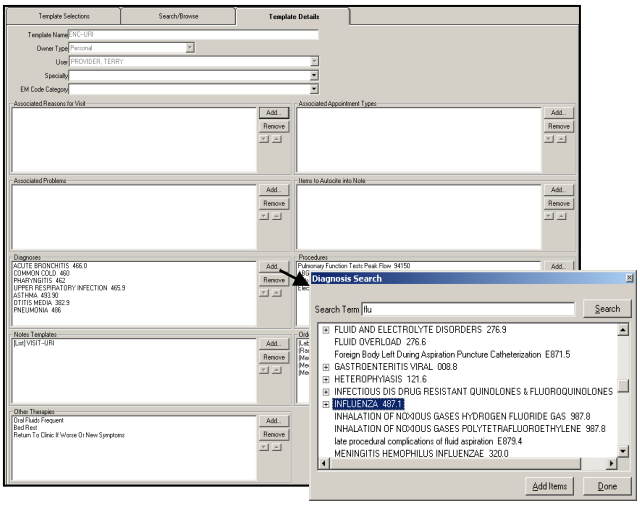
Browse From Here: Browses from the selected term in the MEDCIN tree to its location within the entire MEDCIN hierarchy. Best used to locate physical finding terms.

Building and Editing Encounter Templates

Encounter Templates allow you to create pick lists that cover an entire patient encounter. Encounter Templates further streamline the documentation process. The Encounter Template is similar to building a personalized superbill that covers specific visit types.

To Build:

1. From the Folder List, open to the Template Management module and click **New** from the Action Bar to create a new Encounter Template.
2. Click **Add** in the Diagnoses area and search for all diagnoses you want to add to the new template.
3. Repeat the **Add** process for Notes Template (S/O template), Procedures, and Other Therapies.
4. Click **Save As** in the Action Bar, name the template, and click **Save**.



To Edit:

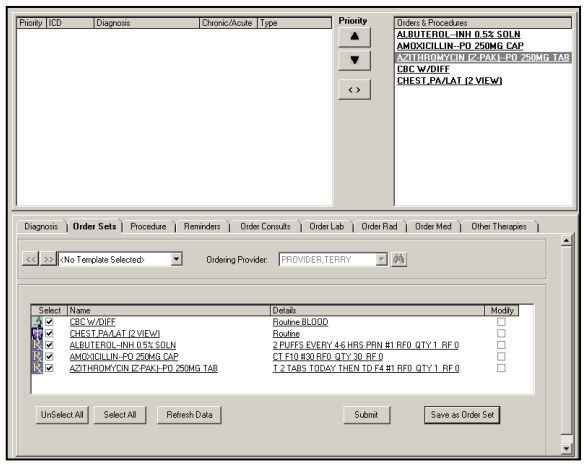
1. Highlight the template you wish to edit and click **View/Edit** in the Action Bar.
2. Add and remove terms from each section.
3. Click **Save** in the Action bar.

Building and Editing Order Sets

Order Sets are templates of lab, rad, and med orders that have been associated with a common diagnosis used to assist the end user in streamlining the ordering process. Order sets can be merged with appropriate Encounter Templates or they can be used independently in the A/P module.

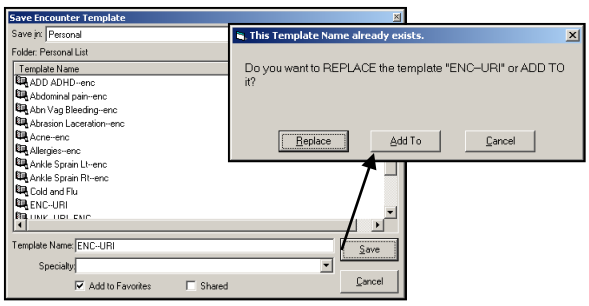
To Build:

1. Create an appt for a test patient in the test clinic and navigate to the A/P module.
2. Search for and document the lab, rad, and/or med order (s) you want to include in the order set. As you document each order, click **Save to Queue** to save each order without submitting it to the ancillary departments.
3. Once all orders have been documented, click the *Order Sets* tab to display the orders that have been documented and saved to the queue. Click **Save as Order Set**.
4. Name the order set and click **Save**. The Order Set Template can be merged with existing encounter templates or used independently in the A/P module.



To Edit:

1. To remove orders from an Order Set Template, open the Template Management module and search for the template.
2. Select the template and click **View/Edit** from the Action Bar. In the Orders pane, select the order (s) and click **Remove**. Save the template.



To add orders to an existing Order Set or Encounter Template, repeat steps 2 and 3 from the Build process. When saving, select the existing template from the list and click **Save**. Click **Add To** to add the new orders to the existing template.